

NOTICES OF SUBSTANTIVE POLICY STATEMENTS

The Administrative Procedure Act requires the publication of substantive policy statements issued by agencies (A.R.S.) § 41101(B)(14)). Substantive Policy Statements are written expressions which inform the general public of an agency's current approach to rule or regulation practice substantive policy statement does not include internal procedural documents which may only affect the internal procedures of the agency and does not impose additional requirements or penalties on regulated parties in accordance with A.R.S. Title 41.

NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Conflict of Interest Ombudsman Program.
Department of Economic Security 8-Older American's Act; 95-03.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
June 21, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to outline what is considered a conflict of interest within the Ombudsman Program, for both Ombudsman staff and volunteers, and potential remedies. Conflict of interests occur when the ombudsman or a member of his immediate family: Have direct involvement in the licensing or certification of a long-term care facility or of a provider of a long-term care service; have ownership or investment interest in a long-term care facility or long-term care service; are employed by, or participate in the management of, a long-term care facility; receive, or have a right to receive, compensation arrangements with an owner or operator of a long-term care facility or receives services from a long-term care provider.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
New statement.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
6. **Information about where a person may obtain a copy of the substantive policy statement and the costs for obtaining the policy statement:**
Copies are available in the Department of Economic Security Authority Library, at 1789 W. Jefferson, Phoenix, Arizona 85007, Site Code 810Z1, or from the person identified in question 5. The first copy is free to a member of the public, for a non-commercial purpose. Additional copies are available at 25¢ per page.

NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Access Ombudsman Program.
Department of Economic Security 8-Older American's Act; 95-04.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
June 21, 1995
3. **Summary of the contents of the substantive policy statement:**
Certified Ombudsman and the state Ombudsman have the right to access a long-term care facility and patient records to assess the validity of a complaint of a resident. The purpose of this policy is to establish procedures for the Ombudsman Program regarding

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this type of access. Further, the resident has the right to communicate privately, or to refuse to communicate, with a Certified Ombudsman if the resident so desires.

4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
New statement.
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DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Complaint Process Ombudsman Program.
Department of Economic Security 8-Older American's Act; 95-05.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
June 21, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish a complaint process within the Ombudsman Program for clients age 60 and older who live in long-term facilities. This includes: intake, screening, investigation, methods, resolutions, case closure and referral for further action.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
New statement.
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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Coordination with Adult Protective Services Ombudsman Program.

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Department of Economic Security 8-Older American's Act; 95-06.

2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**

June 21, 1995

3. **Summary of the contents of the substantive policy statement:**

The purpose of this policy is to establish a system of coordination, especially with regard to jurisdiction over investigations, between the Ombudsman Program and the Adult Protective Services Program, part of the Department of Economic Security, Aging and Adult Administration.

4. **A statement as to whether the substantive policy statement is a New statement or a revision:**

New statement.

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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**

Certification and Training Ombudsman Program.

Department of Economic Security 8-Older American's Act; 95-07.

2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**

June 23, 1995

3. **Summary of the contents of the substantive policy statement:**

The purpose of this policy is to establish minimum guidelines for the training, certification, recertification, de-certification, and appeal process for paid and volunteer representatives of the Ombudsman Program. It also includes the application process for becoming a trained ombudsman and the requirements of the health exams, fingerprinting and training.

4. **A statement as to whether the substantive policy statement is a New statement or a revision:**

New statement.

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DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**

Case Management System.

Department of Economic Security 8-Older American's Act; 90-27.

2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**

June 5, 1995

3. **Summary of the contents of the substantive policy statement:**

This policy outlines the necessary requirements for the Identification of Needs process utilizing the Arizona Standardized Client Assessment Plan (ASCAP) as well as guidelines for approaching case management theory. Further, it highlights the need for a separate administrative unit if other services are provided.

4. **A statement as to whether the substantive policy statement is a New statement or a revision:**

Revised statement: Revised from 1990 issue.

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DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**

Identification of Needs.

Department of Economic Security 8-Older American's Act; 90-28.

2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**

June 5, 1995

3. **Summary of the contents of the substantive policy statement:**

Federal law, the Older American's Act requires the Planning and Service Areas to identify needs within the area and report back to the State Unit on Aging in the form of an area plan. The purpose of this policy is to establish minimum procedures for the prioritizing of needs. Included in this policy is the guidelines for conducting the needs assessment process.

4. **A statement as to whether the substantive policy statement is a New statement or a revision:**

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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Unusual Incident Reporting.

Department of Economic Security 8-Older American's Act; 90-31.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

March 29, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for notification of appropriate Area Agency on Aging and State Agency on Aging staff of unusual incidents involving death, severe personal injury, or property damage that will impact clients, staff, volunteers or the administration of contractors/subcontractors. This includes the categories of unusual incidents, reporting requirements, content/timing or reports, actions that shall be initiated after receiving such reports, and the responsibility of the Area Agencies on Aging to report back to the Aging and Adult Administration.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Targeting of Services.

Department of Economic Security 8-Older American's Act; 90-33.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

June 5, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for the targeting of services, by the Aging and Adult Administration, the Area Agencies on Aging, and subcontractors, to those with great social and economic need giving priority to low-income minority individuals.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Funds Used for Multipurpose Senior Center Acquisition and/or Construction.
Department of Economic Security 8-Older American's Act; 90-37.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

June 5, 1995

3. Summary of the contents of the substantive policy statement:

According to federal guidelines, the Aging and Adult Administration must provide sites for the provision of services in the local communities. The purpose of this policy is to establish procedures for the acquisition, construction, and/or renovation of multipurpose senior centers, and to monitor federal funds utilized for that purpose. Further, it outlines the requirements for repayment of finances.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Non-Medical Home and Community Based Services.
Department of Economic Security 8-Older American's Act; 90-36.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

June 5, 1995

Notices of Substantive Policy Statements

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish the basic goals of non-medical home and community based services to assist functional impaired individuals in avoiding premature institutionalization by providing support services. See #90-41 for more information regarding the types of services, methodology and eligibility requirements.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Outreach.

Department of Economic Security 8-Older American's Act; 90-35.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

March 29, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish guidelines to ensure outreach to minorities, those living in rural areas, individuals with the greatest social or economic need, and individuals with disabilities. It issues requirements for the area plan as well as provisions for communities that have a high number of non-English-speaking individuals to ensure equal access to services.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
State Plan on Aging.
Department of Economic Security 8-Older American's Act; 90-34.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
June 5, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish procedures for the development of the state plan, including format, content, and time guidelines. Time lines offered are Arizona State Aging and Adult Administration guidelines.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
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DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Contract Monitoring
Department of Economic Security 8-Older American's Act; 90-23.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
June 5, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish procedures for monitoring the programmatic, administrative, and fiscal management of the Area Agencies on Aging and other contractors. This includes the notice of monitoring, the types of activities that will be monitored, and the potential action required by the provider.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
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DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Legal Assistance

Department of Economic Security 8-Older American's Act; 90-24.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

June 5, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for the provision of legal services through the Area Agencies on Aging including the criteria for selecting providers and provider responsibilities. It further outlines the requirement of priority services including minority, low-income, frail and disabled adults.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

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1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Programmatic Statistic Reporting

Department of Economic Security 8-Older American's Act; 90-25.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

June 5, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for the monthly programmatic statistical reporting by the Area Agency on Aging and their contractors. It provides detailed instruction for the completion of all reports, including the demographic, congregate meal, persons and unit data, and monthly home-delivered meals reports.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

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1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Confidentiality/Disclosure of Information.
Department of Economic Security 8-Older American's Act; 90-26.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

March 29, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish guidelines to protect the confidentiality of information about clients receiving services through the Aging and Adult Administration and the Area Agencies on Aging. This policy outlines what is considered to be confidential information, exceptions to the policy, and provider responsibility in maintaining client confidentiality.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

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1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Public Hearings
Department of Economic Security 8-Older American's Act; 90-19.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

March 28, 1995

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3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish minimal information requirements to be made available to the public when conducting Public and Area Plan hearings. This policy must be adhered to by both the State Agency on Aging and the Area Agencies on Aging whenever public comment is requested in order to facilitate the understanding of the public when an Area Agency on Aging intends to amend, waive, or submit an Area Plan on Aging.
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1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Advisory Council
Department of Economic Security 8-Older American's Act; 90-18.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
May 10, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish an Advisory Council within each Area Agency on Aging in order to enhance the services of that agency. The function of the Advisory Council is to advise, recommend, and further the mission of the Area Agency on Aging. This policy outlines the amount of training, responsibilities, and composition of the advisory council.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
6. **Information about where a person may obtain a copy of the substantive policy statement and the costs for obtaining the policy statement:**
Copies are available in the Department of Economic Security Authority Library, at 1789 W. Jefferson, Phoenix, Arizona 85007, Site Code 810Z1, or from the person identified in question 5. The first copy is free to a member of the public, for a non-commercial purpose. Additional copies are available at 25¢ per page.

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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Community Focal Point
Department of Economic Security 8-Older American's Act; 90-17.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
May 12, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish sites as community focal points as locations for comprehensive service delivery of the Older American's Act. This policy outlines the specific facility requirements for both metro and rural Arizona. Additionally, it describes the process for requesting a waiver from those requirements from the Aging and Adult Administration.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Operations-Title V Senior Community Service Employment Program
Department of Economic Security 8-Older American's Act; 95-05-01.
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
July 20, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish procedures for the administration of the Title V Senior Community Service Employment Program including enrollment priorities, eligibility criteria, training, benefits, and other program requirements.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
New statement.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Grievance Procedures Senior Community Service Employment Program

Department of Economic Security 8-Older American's Act; 95-05-02.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

August 3, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for grievances within the Title V Senior Community Service Employment Program.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

New statement.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Adult Protective Services

Department of Economic Security Chapter 5 Article 56.

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

December 1988

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for the administration of the Adult Protective Services program including the process for investigating reports, providing services, case management, and confidentiality.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Statement has not been revised.

Arizona Administrative Register
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5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Cash Disbursement & Expenditure Reports
Department of Economic Security 8-Older American's Act; 90-08

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

May 5, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for the Area Agencies on Aging with regard to fiscal control and fund accounting procedures to ensure proper disbursement of all funds. This policy includes information regarding USDA budget requirements and USDA reimbursement policy, as well as outlining the proper reporting forms for monthly financial reports.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

Name: Karen Latimer, Policy Specialist
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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Establishment of the Area Agencies on Aging
Department of Economic Security 8-Older American's Act; 90-02

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

April 12, 1995

Arizona Administrative Register
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3. Summary of the contents of the substantive policy statement:

Federal law, (The Older American's Act) requires the designated State Agency on Aging to subdivide the state into Planning and Service Areas (PSA's) and to designate an Area Agency on Aging for each Planning and Service Area. The policy explains the criteria DES-A&AA considers when making the designation including capabilities and staff; the administrative responsibilities of the Area Agencies including management, administration, service development, advocacy; and remedies for the failure of Area Agencies on Aging to follow Department of Economic Security guidelines.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

Name: Karen Latimer, Policy Specialist
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6. Information about where a person may obtain a copy of the substantive policy statement and the costs for obtaining the policy statement:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Separate Organizational Unit designation
Department of Economic Security 8-Older American's Act; 90-03

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

April 12, 1995

3. Summary of the contents of the substantive policy statement:

According to the Older Americans Act, Section 305, Area Agencies on Aging may be any "public or non-profit private agency within a Planning and Service Area, or any separate organizational unit within such an agency which is under the direction of the state agency and which can and will engage only in the planning or provision of a broad range of supportive aging, social and nutrition services". Area Agencies on Aging that are smaller organizational units within a larger organization must be able to fulfill all administrative requirements for a designated Area Agency on Aging. This policy outlines those administrative requirements including: organization, administration, staffing and structure, reporting requirements, required policies and documentation, service development; and consequences for non-compliance.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575

6. Information about where a person may obtain a copy of the substantive policy statement and the costs for obtaining the policy statement:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Program Development and Coordination
Department of Economic Security 8-Older American's Act; 90-04
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
April 14, 1995
3. **Summary of the contents of the substantive policy statement:**
This policy applies to area agencies on aging and establishes requirements and limitations on the use of certain federal funds. It outlines how Area Agencies on Aging may obtain approval for the use of certain restricted funds and the conditions that must be met before DES-A&AA can authorize use of such funds.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
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Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
6. **Information about where a person may obtain a copy of the substantive policy statement and the costs for obtaining the policy statement:**
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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Service Contributions
Department of Economic Security 8 - Older American's Act; 90-20
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
May 12, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish guidelines for the voluntary contributions of the public to the cost of services provided by an Area Agency on Aging or a subcontractor. Further it outlines the responsibilities and minimum standards for the management of these funds.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
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Arizona Administrative Register
Notices of Substantive Policy Statements

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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Eldercare
Department of Economic Security 8-Older American's Act; 90-38
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
June 5, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish procedures for eldercare services within the Area Agency on Aging which include: Information and Referral, Advocacy, Education/Training, Service Coordination, Support Groups, Case Management, Home Care, and Respite Care. Further it provides for guidelines for confidentiality, targeting, fiscal controls, and programmatic reporting.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
Eligibility Requirements for Non-medical Home and Community-based Services
Department of Economic Security 8-Older American's Act; 90-41
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
June 5, 1995
3. **Summary of the contents of the substantive policy statement:**
The purpose of this policy is to establish minimum eligibility requirements for non-medical home and community-based services. Non-medical home and community-based services include, but are not limited to, the following: Adult Day Care/Adult Day Health, Attendant Care, Case Management, Chore Services, Home-delivered Meals, Home Health Aid, Personal Care, Respite Sitter Care, Home Nursing Services, Transportation for medical appointments, or access to other services. For further guidelines for non-medical home and community-based services, see policy #90-36.

Notices of Substantive Policy Statements

4. A statement as to whether the substantive policy statement is a New statement or a revision:
Revised statement: Revised from 1990 issue.
5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:
Administration Ombudsman Program
Department of Economic Security 8-Older American's Act; 95-02
2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:
June 19, 1995
3. Summary of the contents of the substantive policy statement:
The purpose of this policy is to establish guidelines for the overall administration of the Ombudsman Program. The goals of the ombudsman program are to protect the human and civil rights of Long-term Care residents to promote their autonomy through individual and collective advocacy efforts to enhance the quality of life for these individuals. Further the State Long-term Ombudsman shall provide administrative policy, training curriculum, certification standards, technical assistance, legal coverage, coordination, communication, back-up, and intervention to the Substate Ombudsman Programs. This policy outlines the procedures for the above duties, as well as the responsibilities of the Area Agency on Aging and the Substate Ombudsman Programs including: advocacy; planning; coordination; inter-agency linkages; and outreach, particularly to the vulnerable, elderly populations living in long-term care facilities.
4. A statement as to whether the substantive policy statement is a New statement or a revision:
New statement.
5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
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Notices of Substantive Policy Statements

NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:
Annual Audits
Department of Economic Security 8-Older American's Act; 95-09
2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:
May 3, 1995
3. Summary of the contents of the substantive policy statement:
The purpose of this policy is to establish procedures for the annual fiscal review of Area Agencies on Aging and other service providers. It includes the types and time lines of the audits that will be conducted, outlines the selection process for audit firms, and the resolution of audit findings.
4. A statement as to whether the substantive policy statement is a New statement or a revision:
Revised statement: Revised from 1990 issue.
5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:
Property Management
Department of Economic Security 8-Older American's Act; 95-10
2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:
May 4, 1995
3. Summary of the contents of the substantive policy statement:
The purpose of this policy is to establish procedures for the management of property including the acquisition of supplies, equipment, instructions, and services by Area Agencies on Aging and other contractors that have been purchased utilizing federal funds. It includes the proper format for maintaining records and the process for disposition of equipment and supplies.
4. A statement as to whether the substantive policy statement is a New statement or a revision:
Revised statement: Revised from 1990 issue.
5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:
Name: Karen Latimer, Policy Specialist
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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Procurement

Department of Economic Security 8-Older American's Act; 90-11

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

May 4, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish procedures for the procurement of supplies, equipment, construction, and other services with federal funds. It outlines the process of procurement including small purchases under \$10,000, Competitive Sealed Bid, Competitive Negotiation, and Non-competitive Negotiation for Sole Source proposals. It also includes the requirements for the Department of Economic Security Aging and Adult Administration to accept complaints or protests regarding contractor selection.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
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NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Area Agency on Aging Assessment Process

Department of Economic Security 8-Older American's Act; 90-14

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

March 24, 1995

3. Summary of the contents of the substantive policy statement:

The purpose of this policy is to establish guidelines for the assessment of Area Agencies on Aging to insure that the agencies have carried out the programs in accordance with the Area Plan. This policy has detailed checklists, standards, and criteria explaining what Department of Economic Security and the Aging and Adult Administration looks at to determine if an area agency is in compliance.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

New statement.

Arizona Administrative Register
Notices of Substantive Policy Statements

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Establishment of the State Agency on Aging
Department of Economic Security 8-Older American's Act; 90-01

2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:

April 12, 1995

3. Summary of the contents of the substantive policy statement:

Federal law (The Older American's Act) requires states to designate a particular state agency to serve as the State Agency on Aging, which is the focal point for all matters related to older persons. The Aging and Adult Administration within the Department of Economic Security ("DES", "A&AA") has been designated by Arizona as the "State Agency on Aging." This policy outlines what Department of Economic Security and the Aging and Adult Administration does to ensure that services to older persons are accessible and responsive including service development, advocacy, and provision of assistance to Area Agencies on Aging.

4. A statement as to whether the substantive policy statement is a New statement or a revision:

Revised statement: Revised from 1990 issue.

5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:

Name: Karen Latimer, Policy Specialist
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NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:

Percentages for Priority Services
Department of Economic Security 8-Older American's Act; 90-05

Arizona Administrative Register
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2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:
April 14, 1995
3. Summary of the contents of the substantive policy statement:
This policy applies to Area Agencies on Aging. Federal law requires the Department of Economic Security to establish the percentages in which Older American's Act funds are allotted to particular services such as legal assistance, in-home services, and advocacy. This policy outlines how DES-A&AA establishes percentages within Arizona, how Area Agencies on Aging must work within the established percentages, and the process to request a waiver from these established percentages.
4. A statement as to whether the substantive policy statement is a New statement or a revision:
Revised statement: Revised from 1990 issue.
5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
6. Information about where a person may obtain a copy of the substantive policy statement and the costs for obtaining the policy statement:
Copies are available in the Department of Economic Security Authority Library, at 1789 W. Jefferson, Phoenix, Arizona 85007, Site Code 810Z1, or from the person identified in question 5. The first copy is free to a member of the public, for a non-commercial purpose. Additional copies are available at 25¢ per page.

NOTICE OF SUBSTANTIVE POLICY STATEMENT
DEPARTMENT OF ECONOMIC SECURITY

1. Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:
Administration Ombudsman Program
Department of Economic Security 8-Older American's Act; 90-06
2. Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:
April 14, 1995
3. Summary of the contents of the substantive policy statement:
The purpose of this policy is to establish guidelines for non-medical, in-home services to frail older adults, victims of Alzheimer's disease, neurological/organic brain disorders, and families of these individuals. This policy contains the eligibility criteria, and Area Agency coordination requirements to ensure that those with the greatest social or economic needs are served.
4. A statement as to whether the substantive policy statement is a New statement or a revision:
New statement.
5. The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
6. Information about where a person may obtain a copy of the substantive policy statement and the costs for obtaining the policy statement:
Copies are available in the Department of Economic Security Authority Library, at 1789 W. Jefferson, Phoenix, Arizona 85007, Site Code 810Z1, or from the person identified in question 5. The first copy is free to a member of the public, for a non-commercial purpose. Additional copies are available at 25¢ per page.

Notices of Substantive Policy Statements

NOTICE OF SUBSTANTIVE POLICY STATEMENT

DEPARTMENT OF ECONOMIC SECURITY

1. **Subject of the substantive policy statement and the substantive policy statement number by which the policy statement is referenced:**
USDA Reporting and Reimbursement
Department of Economic Security 8-Older American's Act; 90-07
2. **Date the substantive policy statement was issued and the effective date of the policy statement if different from the issuance date:**
April 24, 1995
3. **Summary of the contents of the substantive policy statement:**
This policy establishes criteria the Area Agencies on Aging and service providers must meet when providing nutrition services to the elderly in order to qualify for reimbursement, including nutritional quality of food served, persons served, and reporting requirements.
4. **A statement as to whether the substantive policy statement is a New statement or a revision:**
Revised statement: Revised from 1990 issue.
5. **The name, address, and telephone number of the person to whom questions about the substantive policy statement may be directed:**
Name: Karen Latimer, Policy Specialist
Address: Arizona Department of Economic Security
1789 W. Jefferson, Site Code 950A
Phoenix, Arizona 85007
Telephone Number: (602) 542-6435 V/TTY
Fax Number: (602) 542-6575
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